IU Office of the Vice President and Chief Financial Officer
Office of the University Controller

UCO Fiscal Officer Newsletter

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An Office of the University Controller (UCO) publication

Welcome to the Fiscal Officer Update! This newsletter is sent to fiscal officers across IU to keep them apprised of important deadlines, new reporting tools, and accounting updates.

A new issue is published the last Wednesday of each month! If you are a new subscriber, archived newsletters can be accessed on the VPCFO Training & Communications website as well as at the link at the bottom of the newsletter.

Have questions for a UCO unit? Contact a team using the Contact Form.

Important Dates

Visit the UCO Fiscal Officer Calendar to review all upcoming events.

Accounting Updates

Payroll

Fiscal Officer Responsibilities for Payroll Processing

Refresh yourself by reviewing PSOP 3.0 - Payroll Procedures for Payments after Death, which outlines the procedures for departments to follow concerning the death of an employee.

[Access PSOP 3.0 >>](#)

University Accounting and Reporting Services

Updating Inactive Delegates

In early January 2022, Primary and Secondary Delegates listed on non-closed accounts (including active and expired accounts) will be inactivated if the individual is no longer associated with Indiana University. This update is part of our continuing effort to improve internal controls and facilitate workflow approvals within our financial systems.

To remain an active Primary or Secondary Delegate, an individual must meet the following criteria:

- Have an employment status equal to A (active), L (leave), S (suspended), W (short work break), or P (leave with pay).

- Have a retired status with an active job.

In the coming months, we will send out reminders and provide additional information to help Fiscal Officers review and update the Primary and Secondary Delegates for their accounts. The intent is to update Primary and Secondary Delegates on a quarterly basis with the initial update occurring in early January 2022. At the same time, we will also perform a second round of updates to Fiscal Officers, Account Managers, and Account Supervisors, similar to what was done in early August. Updates to Fiscal Officers, Account Managers, and Account Supervisors will also occur on a quarterly basis from that point forward.

Please contact University Accounting & Reporting Services at uars@iu.edu with any questions.

University Tax Services

Independent Contractor Questionnaire Reminder

Do you need to pay an IU employee as an independent contractor through BUY.IU? An Independent Contractor Questionnaire (ICQ) must be completed first. The ICQ is available on the UCO website.

Tax uses the information collected on the questionnaire to determine how the individual can be compensated. Employees should not be paid as independent contractors unless Tax determines that method of payment is appropriate.

For more information about employee or independent contractor determinations, please review policy FIN-ACC-630: Determination of Employee or Independent Contractor Status.

[Access the ICQ >>](#)
[Review Policy FIN-ACC-630 >>](#)

Other Updates

VPCFO Training & Communications

Reminder: Travel Training Recordings

Last month, the VPCFO Training Team hosted two approver-focused webinars on travel-related topics. Links to these recordings are available below. Each video contains bookmarks so you can jump to the topic you're most interested in.

- **[Travel Document Approver 101](#):** This webinar discusses what an approver's approval represents and demonstrates what to look for

when reviewing and approving Chrome River travel reports.

- **Smooth Operations: Approver Setup:** How to setup travel document approvers in KFS and determine what types of Chrome River delegates your department needs.

Coming Soon: Purchasing Training

This October, BUY.IU gets a new look and feel with an interface upgrade. To help ease the transition, and to help you brush up on your Purchasing and Accounts Payable knowledge, the Training Team is hosting a variety of webinars. Highlighted below are a couple of sessions that may be of particular interest to you or your staff:

- **Approver Setup**: How to setup BUY.IU approvers in KFS, proper usage of substitute approvers, tips and tricks for filtering approval pages, general document review tips.

- **Invoice Review and Approval**: This session focuses in on invoice routing, what actions are required at each workflow stop, as well as a demonstration of how to review and approve a BUY.IU invoice.

There's much more where that came from! Click here to view our full event calendar and register. Questions? No problem! Email the Training Team at estc@iu.edu.

> **Web Updates**
>
> The UCO website continues to evolve. Web updates, such as new accounting standards, service pages, and more are posted on the web updates page by the 15th of each month.
>
> Click here to review the latest updates.